Version	**:**	3.1.1.5
Revision	**:**	1
Website	**:**	www.kayako.com
Forums	**:**	http://forums.kayako.com
Support	**:**	http://support.kayako.com
Editorial	**:**	docs@kayako.com

Kayako SyncWorks

User Manual

About this manual

This version of the manual can be used as a guide for many other proceeding and proceeding versions of Kayako InstaAlert. However, please note that feature discrepancies may exist between versions.

We publish a new and up to date manual upon the release of each stable build. For accuracy, be sure to use the manual(s) bundled with your downloaded SupportSuite package.

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated. Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Support desk** – www.kayako.com/support
- **Community forums** – http://forums.kayako.com

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Introduction to Kayako SyncWorks

Kayako SyncWorks is an application for Microsoft Office Outlook (*Microsoft® Corporation*) that communicates with your installation of **SupportSuite**, **eSupport** or **LiveResponse**, synchronizing events, appointments, tasks and contacts with your installation of Outlook.

SyncWorks operates entirely within Outlook.

SyncWorks can also be used in conjunction with **Kayako LiveResponse Client Application SIP Addon**, and can be used to import Outlook contacts into the SIP addon's VoIP phone.

SyncWorks can be configured to alert you in a variety of ways, including:

- Automatic synchronization.
- Selective synchronization – choose which items to synchronize and which way.
- Action permissions (can events deleted in SupportSuite be deleted in Outlook?).

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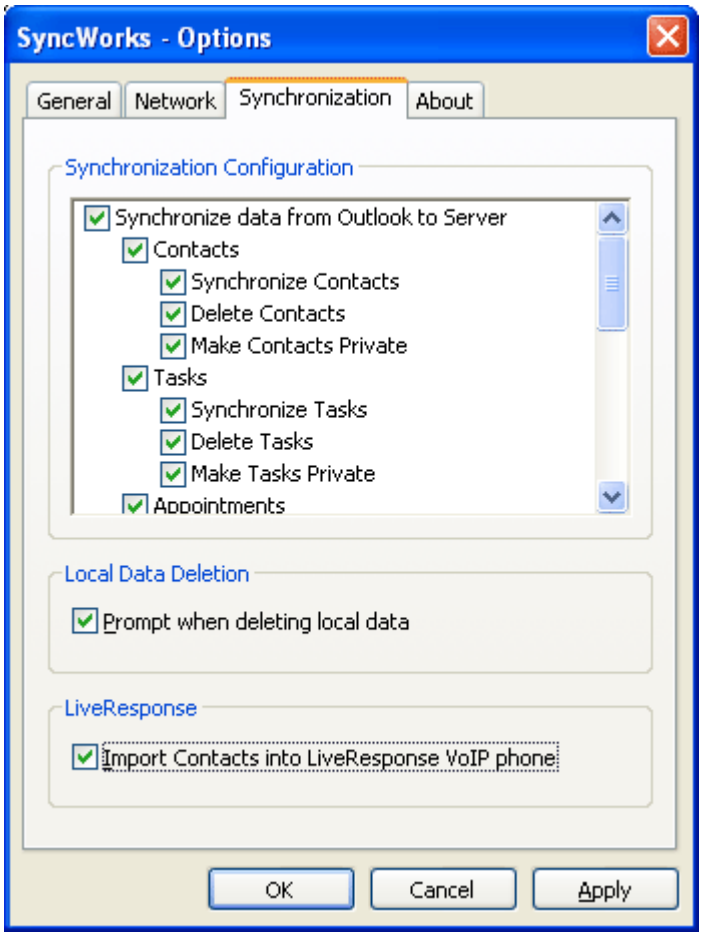
SyncWorks feature list



Above: SyncWorks' synchronization options dialog.

- Synchronizes data between your SupportSuite, eSupport or LiveResponse and your Outlook installation.
    - Calendar events and appointments.
    - Contacts and address book.
    - Task list.
- Maintain item privacy (if an item is marked as private in Outlook, the tem will be marked as private to your user account in SupportSuite, eSupport or LiveResponse).
- Configure specific synchronization options.
    - Such as, synchronize one way or both ways (mirror or synchronize).
    - Select which items to synchronize.
    - Select whether deletions should be synchronized.
- Connect via a network proxy.
- Automatic synchronization on Outlook startup.
- Automatic synchronization at specified regular intervals.

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Downloading SyncWorks

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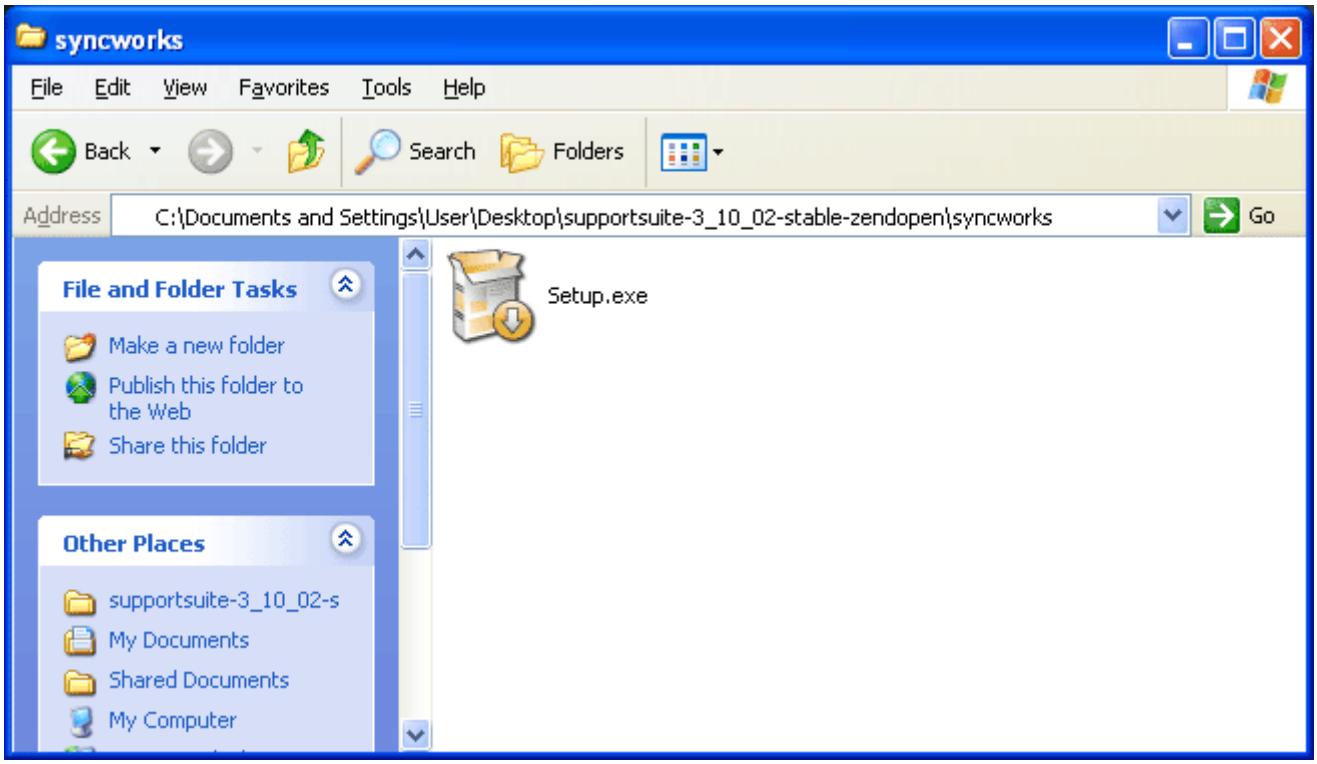
Locating the SyncWorks set up files

This SyncWorks set up files can be found in the archive of **SupportSuite**, **eSupport** or **LiveResponse** that is available for downloaded from the member's area (http://members.kayako.net), as shown below.

The SyncWorks setup files will be found in the folder **\syncworks** of the **.tar.gz** archive, as shown below.



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Getting the latest version

The latest stable version of InstaAlert can be downloaded from http://hotfix.kayako.com. It is recommended you download a copy from this location, so that you can be sure you have the most up-to-date release.

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Installation Guide

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Step one

After downloading the latest version of the SyncWorks software, run **Setup.exe**. This will bring up a window similar to the following.

Press the **Next** button to continue.

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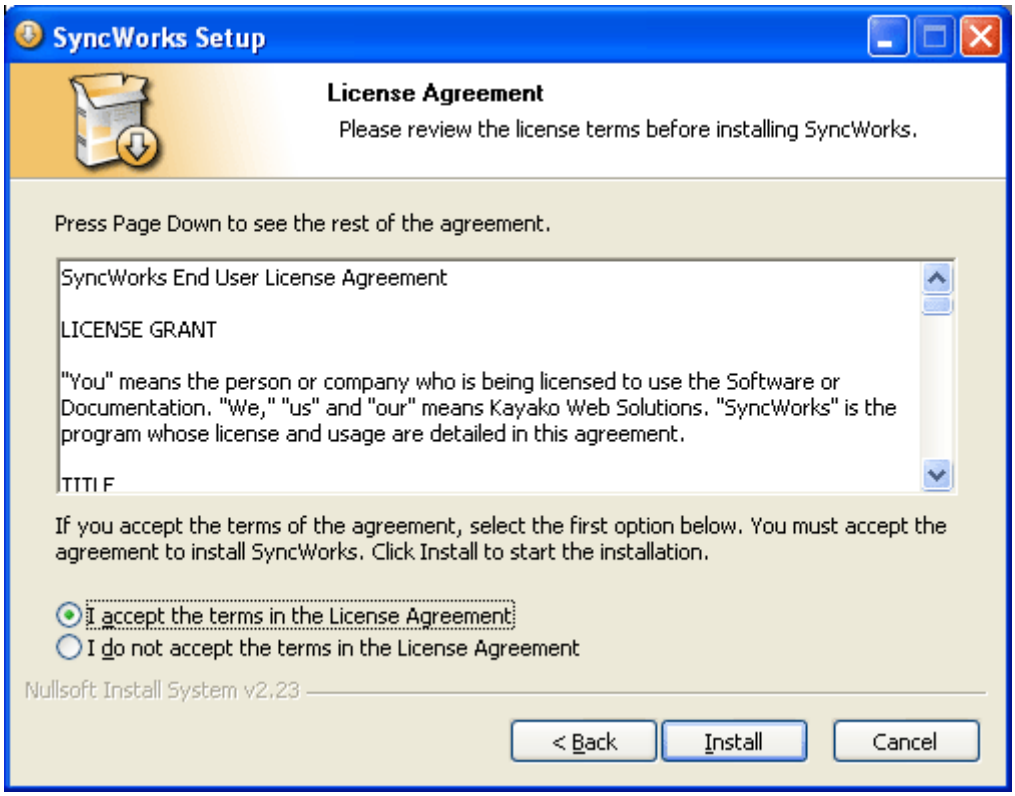
Step two: License agreement



Review the license agreement and accept the terms as appropriate.

Press **Install** to proceed with the installation. The InstaAlert program files will now be installed onto the system and configured. This process is automatic.

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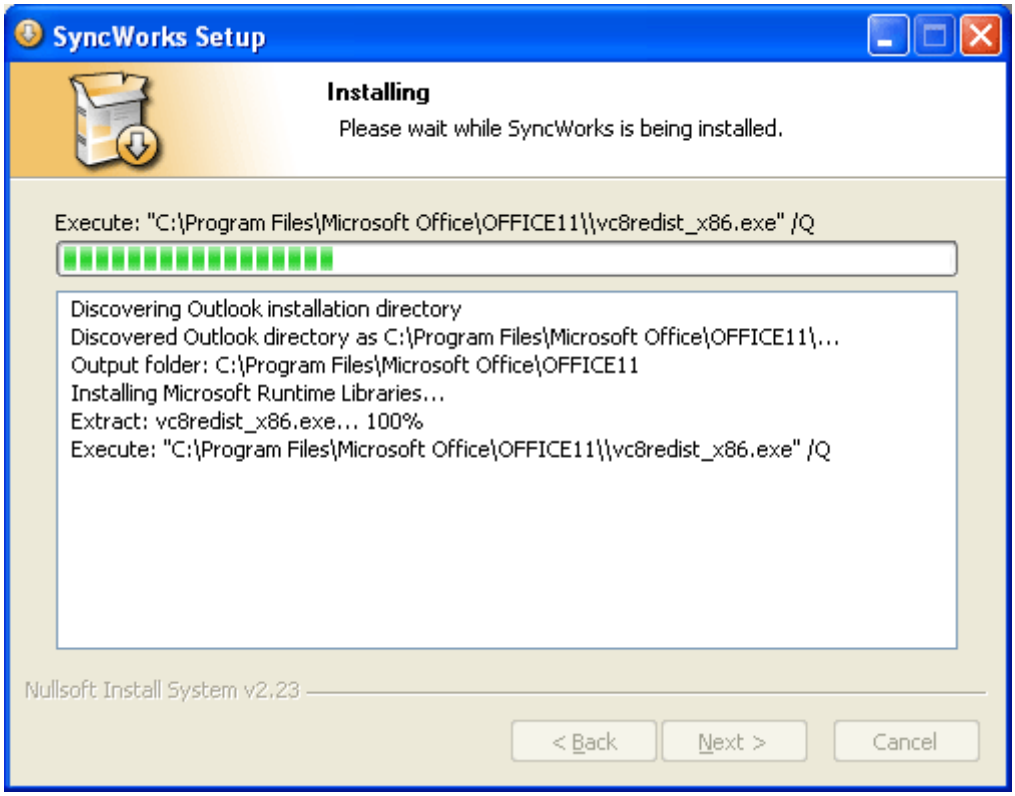

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"Outlook is already running" error

If you receive the error above, it means that Outlook is either running or is running in the background.

To check if Outlook is running in the background, launch the **task manager** (press the CTRL + ALT + DEL keys simultaneously) and search for the process **OUTLOOK.EXE**. If you find it, select the process and click on the **End Process** button.

Go back to your error message and click on the **Retry** button. The installation should proceed as normal.

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Step three: Completion

After the automatic installation procedure has completed successfully, the first time setup guide will launch (see first-time configuration guide).

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First-time Configuration Guide

The first-time configuration process is a procedure that you are taken through following the first run of the SyncWorks program. The wizard will take you through the basic configurations required to get SyncWorks up and running.

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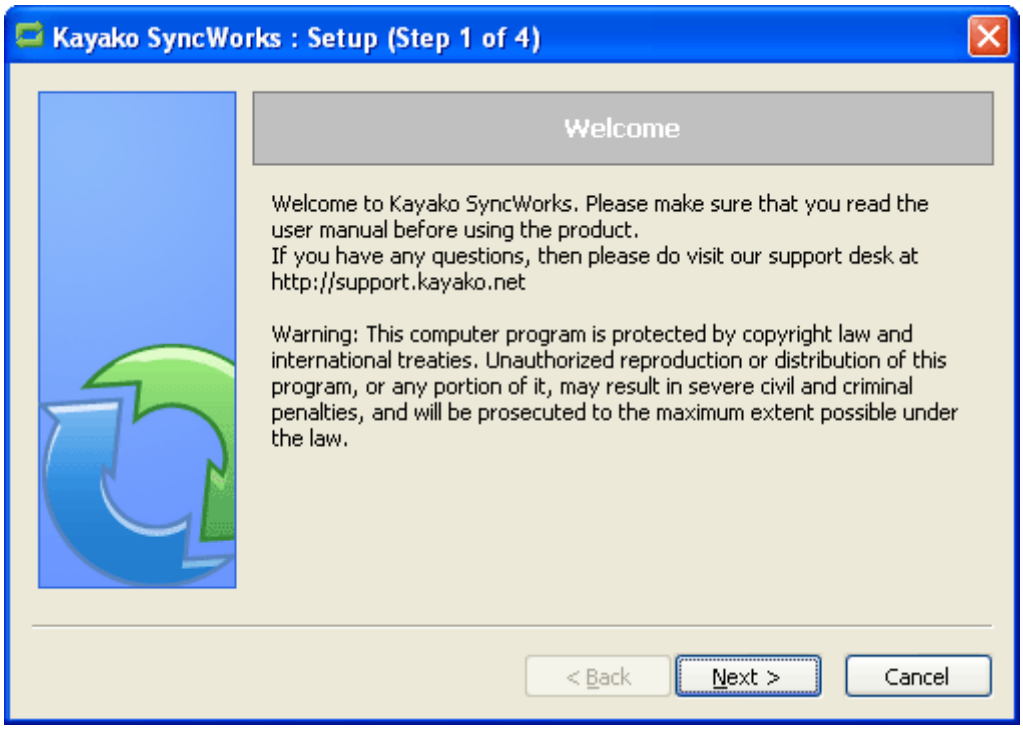
Step one

If this is the first time you have run SyncWorks, you will be presented with the first screen of the first-time setup wizard. This wizard will guide you through the steps necessary to customize the installation and connect and begins synchronizing to your eSupport or SupportSuite installation.



Click on the **Next** button to continue.

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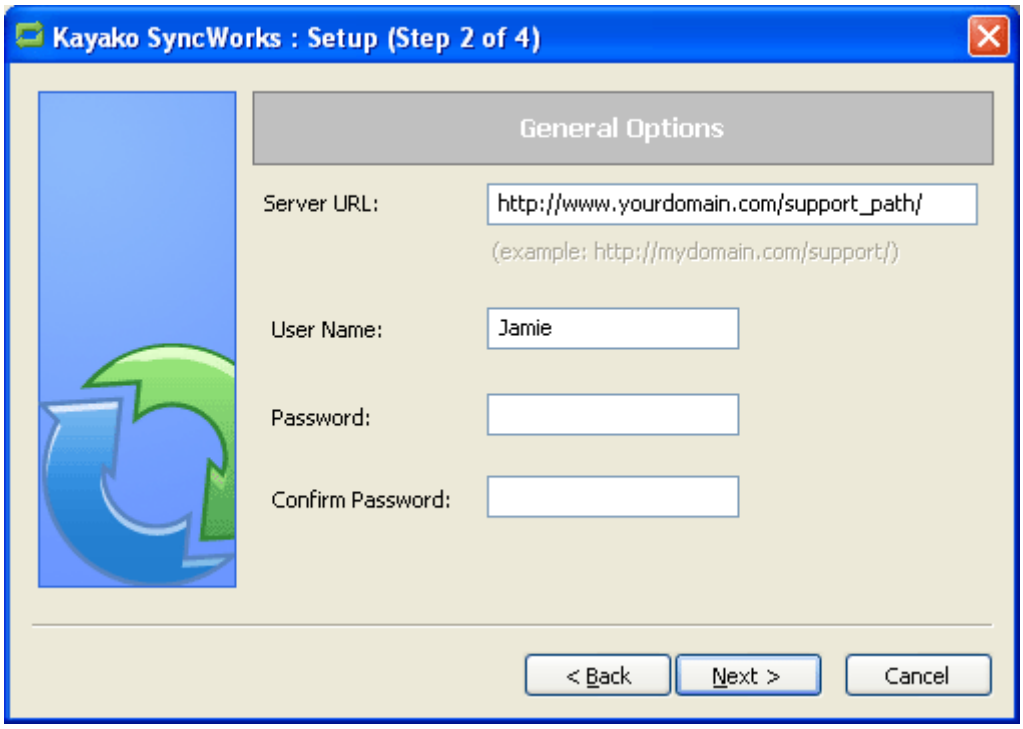
Step two: Authentication details



1. **Server URL** – this is the location of the SupportSuite, eSupport or LiveResponse installation. If you have installed the support software at http://www.joeblogs.com/support/, then enter this as the Server URL.

The Server URL **should not** be the URL of your staff or admin control panel. It should be the location in which you have installed eSupport or SupportSuite – i.e. the location to which your users browse to in order to access your support desk.

2. **User Name** – this is your username and password that you use to login to the **staff control panel** of the SupportSuite, eSupport or LiveResponse installation.

3. **Password** – this is the password you use in conjunction with your username as detailed above.

Click on the **Next** button to continue.

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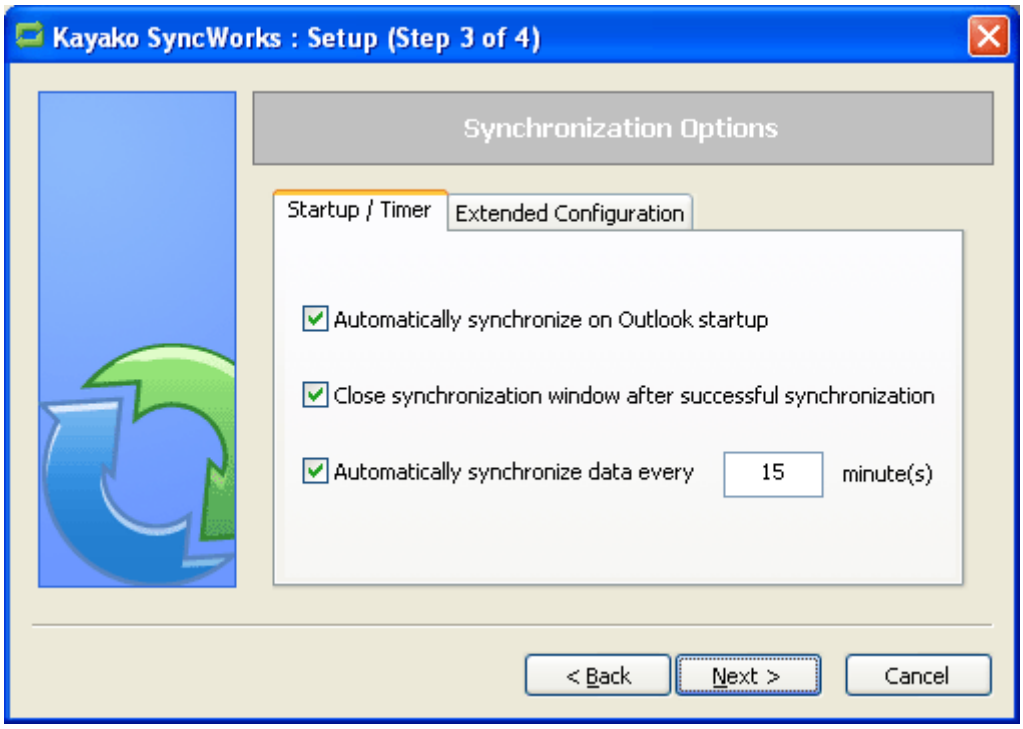
Step three: Synchronization settings



- **Automatically synchronize on Outlook startup** – if enabled, SyncWorks will automatically synchronize with your server on startup.
- **Close synchronization window after successful synchronization** – if enabled, the successful synchronization window will be closed rather than remain opened.
- **Automatically synchronize data every X minutes** – if enabled and specified, SyncWorks will automatically synchronize with your server at the specified interval.

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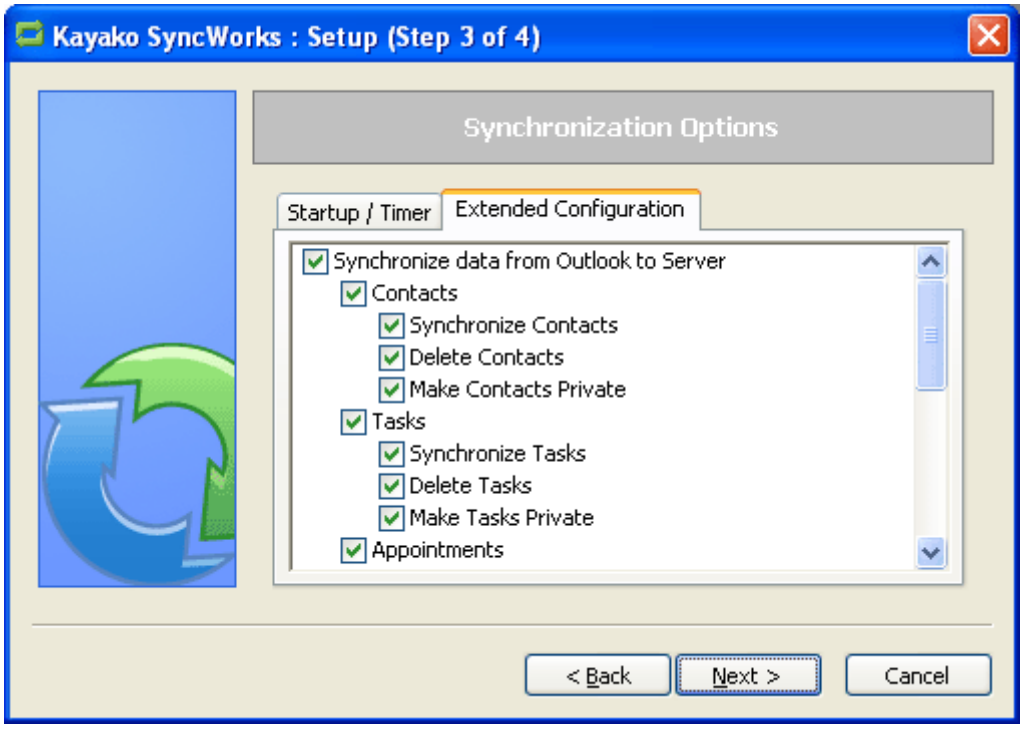

- **Synchronize data from Outlook to Server** – if enabled, data stored in your Outlook installation will be uploaded and synchronized to your SupportSuite, eSupport or LiveResponse installation.
    - **Contacts**
        - **Synchronize Contacts** - if enabled, contacts added or modified in Outlook will be added or modified on your server.
        - **Delete Contacts** – if enabled, contacts deleted in Outlook will also be deleted from the server installation.
        - **Make Contacts Private** – if enabled, contacts made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.
    - **Tasks**
        - **Synchronize Tasks** - if enabled, tasks added or modified (such as marked as complete) in Outlook will be added or modified on your server.
        - **Delete Tasks** – if enabled, tasks deleted in Outlook will also be deleted from the server installation.
        - **Make Contacts Tasks** – if enabled, tasks made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.
    - **Appointments**
        - **Synchronize Appointments** - if enabled, appointments added or modified (such as having the date changed) in Outlook will be added or modified on your server.

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- **Delete Appointments** – if enabled, appointments deleted in Outlook will also be deleted from the server installation.
- **Make Contacts Appointments** – if enabled, appointments made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.

- **Synchronize data from Server to Outlook -** if enabled, data stored in your SupportSuite, eSupport or LiveResponse installation will be downloaded and synchronized with your Outlook installation.
  - Each option following is the same as above, but the reverse (instead of Outlook -> Server, Outlook <- Server).

Click on the **Next** button to continue.

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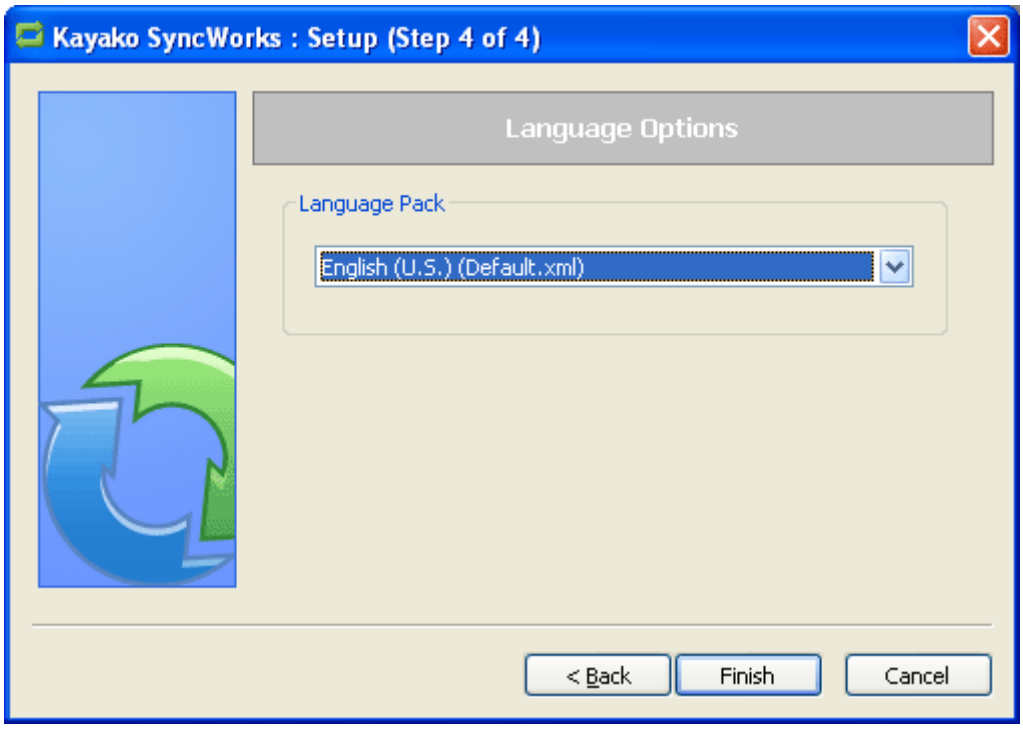
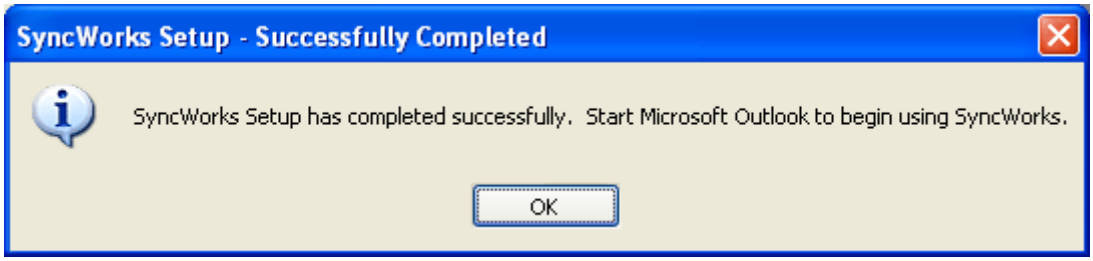
Step four: Language



Which language pack SyncWorks will use is specified here.

By default, the only language pack for InstaAlert bundled with the installation files is the default **English (U.S.)** language file.

Press the **Finish** button to complete the configuration and start using SyncWorks.



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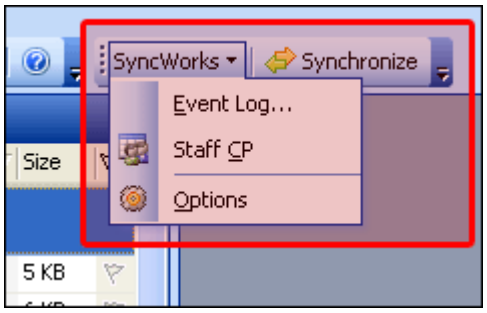
SyncWorks toolbar



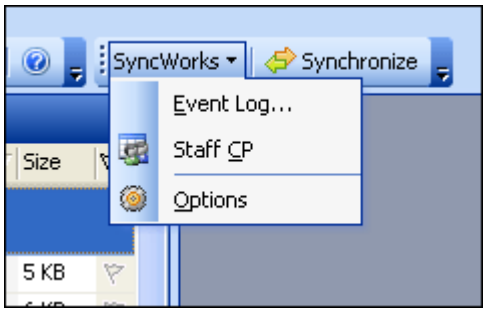
The SyncWorks toolbar should become automatically available within Outlook, as shown above.

If it is not, to make the toolbar available:

1. Click on the **View** menu.
2. Click on the **Toolbars** menu.
3. Click on **Kayako SyncWorks**.

To perform an immediate synchronization, click on the Synchronize button on this toolbar.

To open the SyncWorks menu, click on the SyncWorks menu button on this toolbar. This will open the SyncWorks menu, as shown below.



- **Event Log** – open the SyncWorks event log (see event logger).
- **Staff CP** – open the SupportSuite, eSupport or LiveResponse staff control panel in your default web browser.
- **Options** – open the SyncWorks options dialog (see configuration and options).

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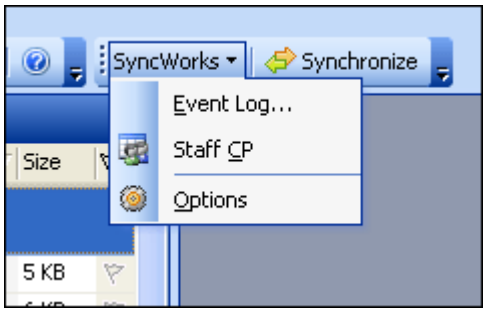
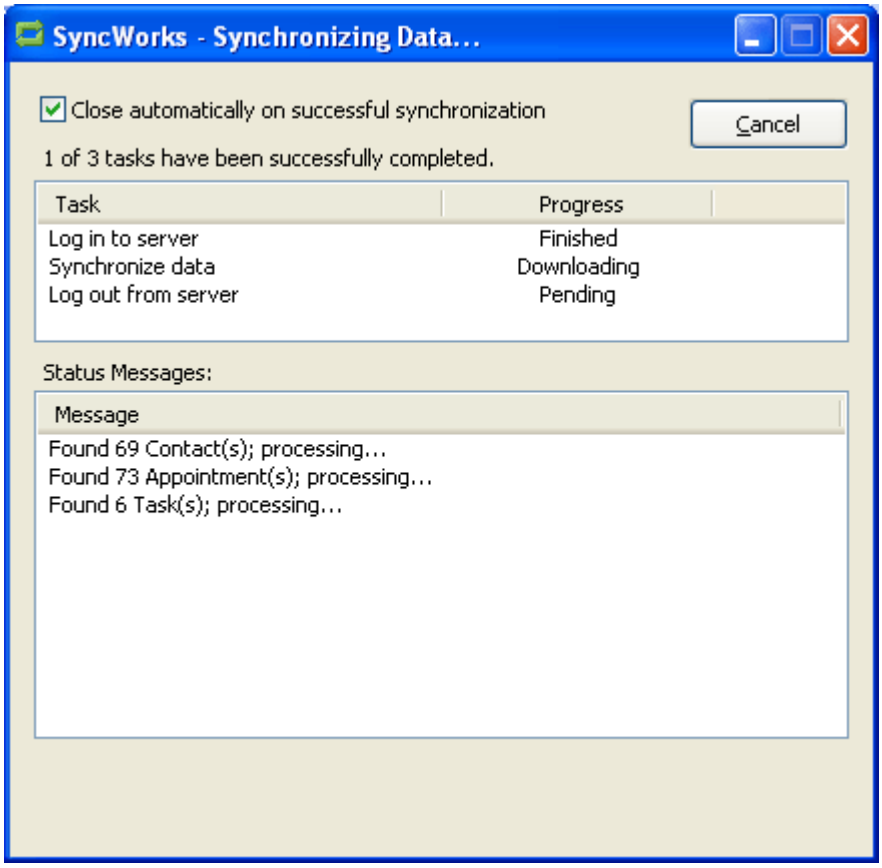
Performing a synchronization

To perform a synchronization:

1. Click on the **Synchronize** button on the **SyncWorks** toolbar, as shown below.



Synchronization will begin immediately, with progress shown in a window as shown below.



If synchronization is unsuccessful, the error message will be displayed in this window. Likewise, if synchronization is successful the success message will be shown here unless automatic closure after successful synchronization has been enabled (see general options).

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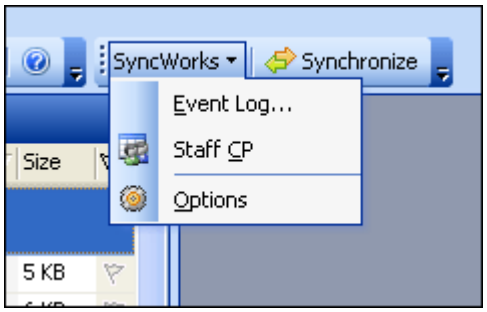
Configuration and options

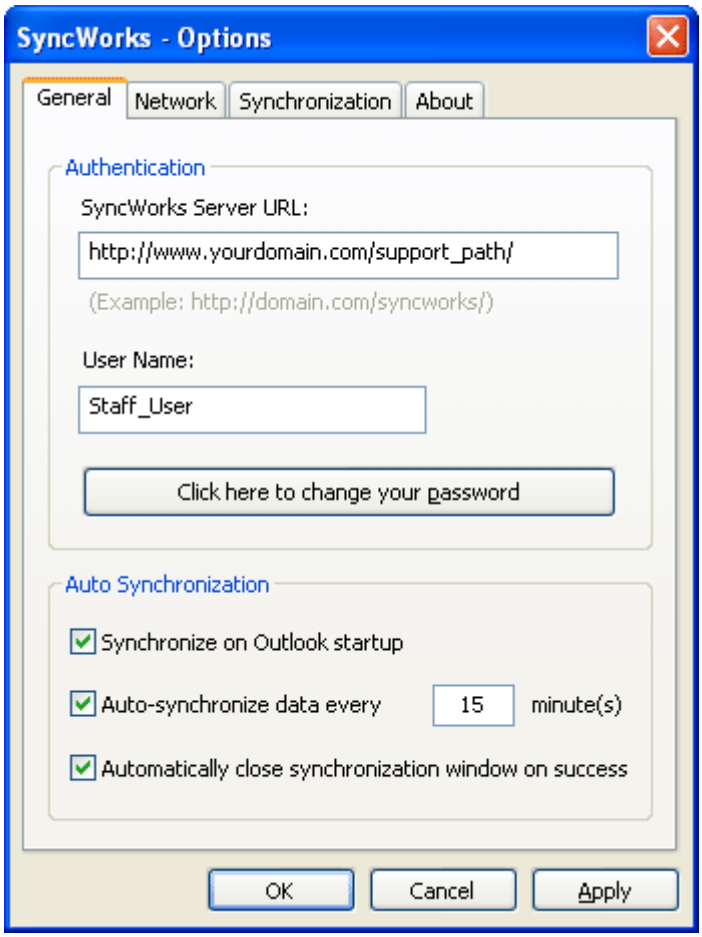
The options dialog is accessible by following these steps:

1. Click on the **SyncWorks** menu on the **SyncWorks** toolbar, as shown below.



2. Click on the **Options** menu choice.

This will open the options dialog, as shown below.



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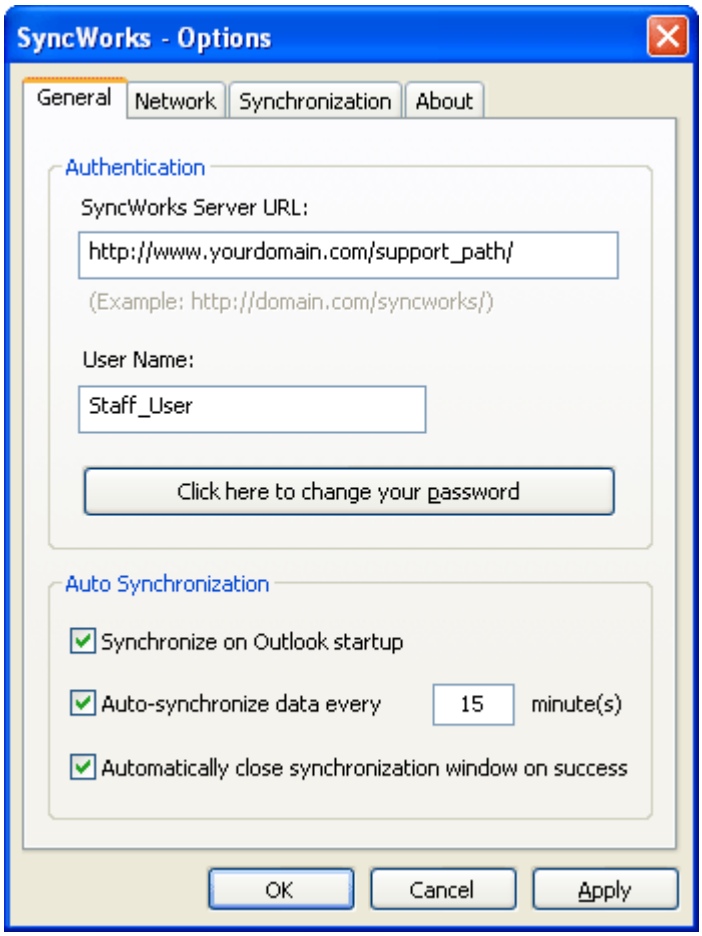
General



Authentication

- **Server URL** – this is the location of the SupportSuite, eSupport or LiveResponse installation. If you have installed the support software at http://www.joeblogs.com/support/, then enter this as the Server URL.

The Server URL **should not** be the URL of your staff or admin control panel. It should be the location in which you have installed eSupport or SupportSuite – i.e. the location to which your users browse to in order to access your support desk.

- **User Name** – this is your username and password that you use to login to the **staff control panel** of the SupportSuite, eSupport or LiveResponse installation.

- **Password** (click on the button) – this is the password you use in conjunction with your username as detailed above.

Auto Synchronization

- **Automatically synchronize on Outlook startup** – if enabled, SyncWorks will automatically synchronize with your server on startup.

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- **Automatically synchronize data every X minutes** – if enabled and specified, SyncWorks will automatically synchronize with your server at the specified interval.

- **Automatically close synchronization window after success** – if enabled, the successful synchronization window will be closed rather than remain opened.

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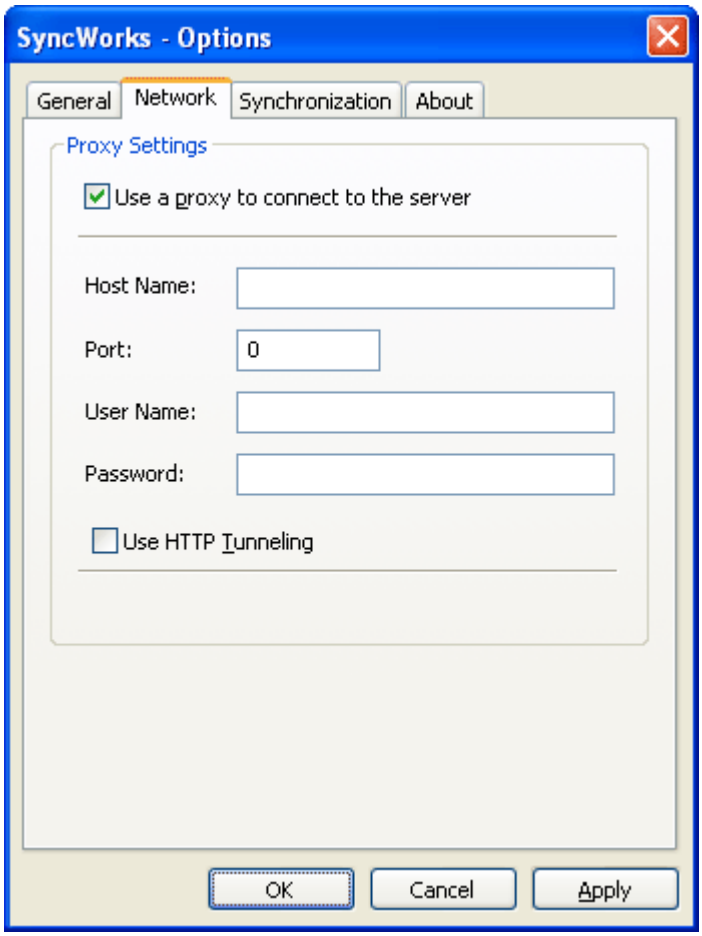
Network



If connection to your eSupport or SupportSuite installation through a proxy is required, the proxy settings can be enabled and configured here.

Normally, users operating from a regular home or office network need not configure any proxy settings.

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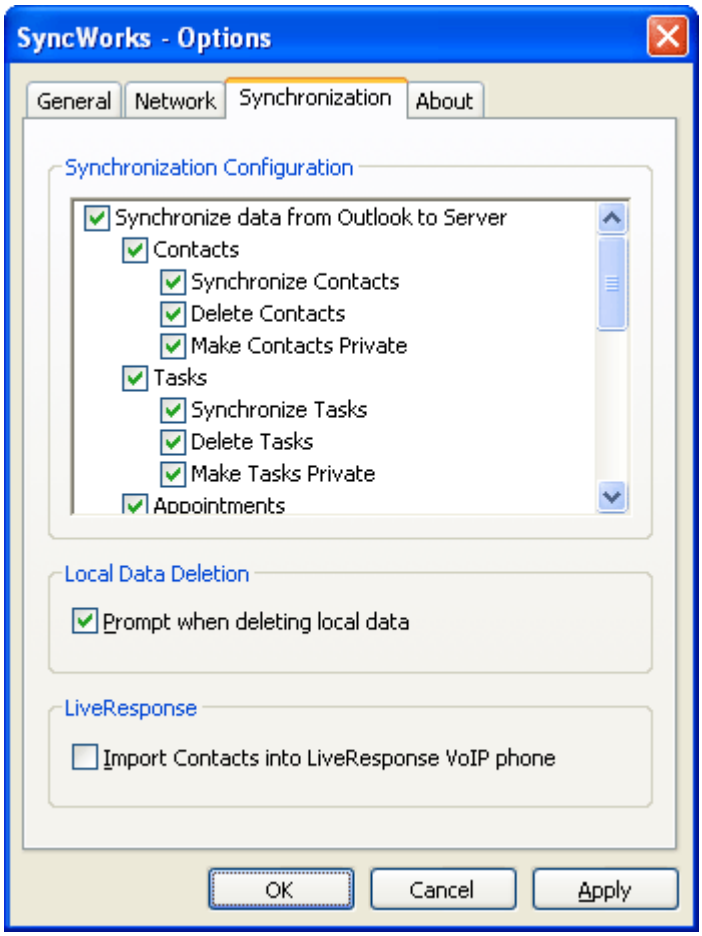
Synchronization



Synchronization Configuration

- **Synchronize data from Outlook to Server** – if enabled, data stored in your Outlook installation will be uploaded and synchronized to your SupportSuite, eSupport or LiveResponse installation.
    - **Contacts**
        - **Synchronize Contacts** - if enabled, contacts added or modified in Outlook will be added or modified on your server.
        - **Delete Contacts** – if enabled, contacts deleted in Outlook will also be deleted from the server installation.
        - **Make Contacts Private** – if enabled, contacts made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.
    - **Tasks**
        - **Synchronize Tasks** - if enabled, tasks added or modified (such as marked as complete) in Outlook will be added or modified on your server.

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        - **Delete Tasks** – if enabled, tasks deleted in Outlook will also be deleted from the server installation.
        - **Make Contacts Tasks** – if enabled, tasks made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.
    - **Appointments**
        - **Synchronize Appointments** - if enabled, appointments added or modified (such as having the date changed) in Outlook will be added or modified on your server.
        - **Delete Appointments** – if enabled, appointments deleted in Outlook will also be deleted from the server installation.
        - **Make Contacts Appointments** – if enabled, appointments made private in Outlook will be made private to your staff user account in SupportSuite, eSupport or LiveResponse.

- **Synchronize data from Server to Outlook -** if enabled, data stored in your SupportSuite, eSupport or LiveResponse installation will be downloaded and synchronized with your Outlook installation.
    - Each option following is the same as above, but the reverse (instead of Outlook -> Server, Outlook <- Server).

Local Data Deletion

- **Prompt when deleting local data** – if enabled, you will be prompted to confirm whether or not local data (stored in Outlook) should be deleted (if deleted in SupportSuite, eSupport or LiveResponse, for example).

LiveResponse

- **Import contacts into LiveResponse VoIP phone** – if enabled, contacts stored in Outlook will be copied into the phonebook of the LiveResponse Client Application SIP Addon (the VoIP phone module). Only enable this if you have the LiveResponse Client Application installed.

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Frequently asked questions

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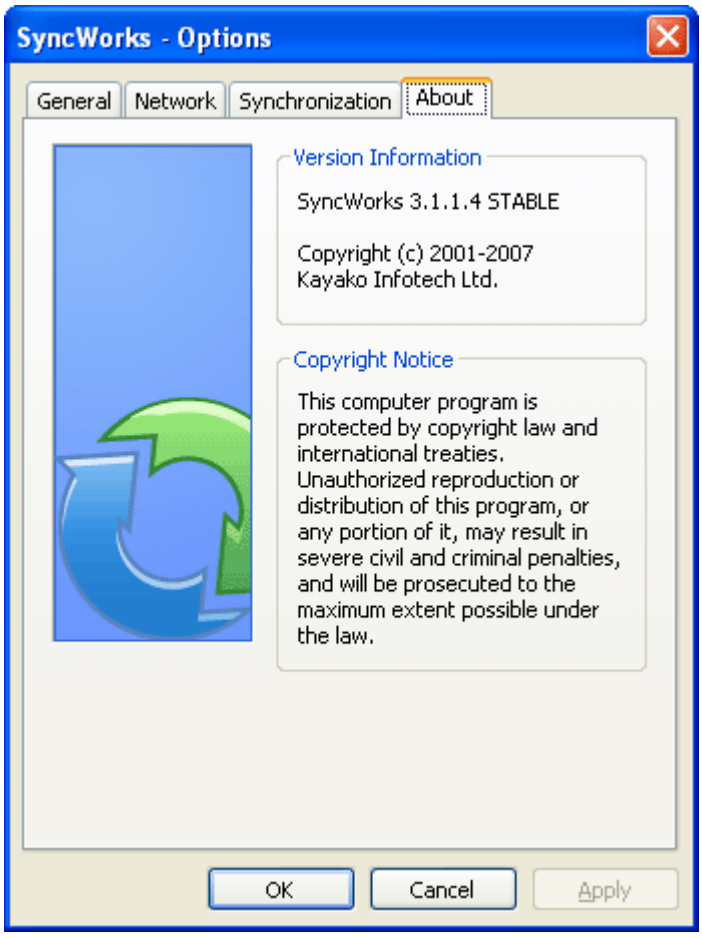
How can I tell what version of SyncWorks I am running?

1. Click on the **Help** menu.
2. Click on the **About** menu choice.

This will bring up the **about box** (as shown below) which will detail what version of SyncWorks you are running.



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How do I view the event log?

Follow the steps outlined here in event logger.

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Error messages explained

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Network error messages

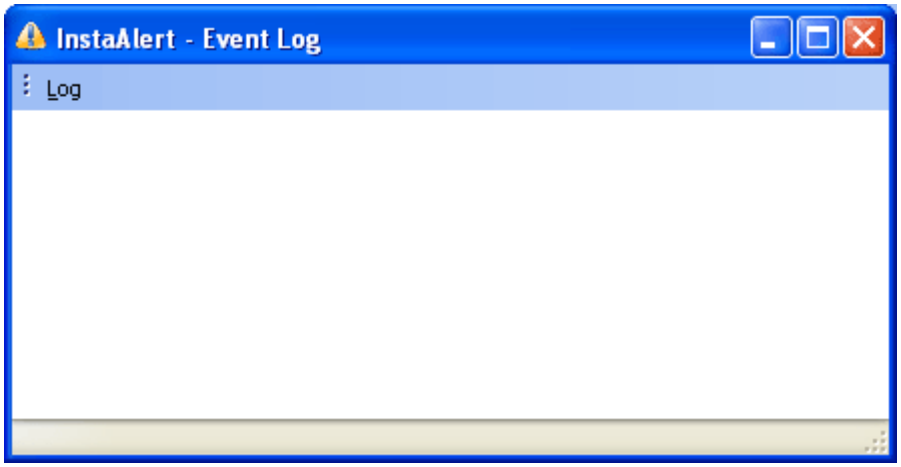
Event logger

InstaAlert has an integrated event logging system and a log viewer. Most errors (among other events) are reported to this log.

To view the event log:

1. Click the **Tools** menu
2. Click the **Event Log** menu choice.

This will bring up a window similar to the following:



"The server returned an error response"

Possible causes:

1. This error is most commonly caused by a *404 Not Found* error, a Forbidden error or any other **HTTP code** that is not 200 (the code for "successful").

Potential solutions:

1. Check you have entered the correct path to your support desk in Options: General.
2. Check the configuration of your web server (such as folder permissions, .htaccess permissions etc.).

"Unknown error"

Possible causes:

1. Something has gone very wrong within the internals of InstaAlert.

Potential solutions:

1. Restart the program. If the problem persists, make sure you have the latest stable build of InstaAlert (see Getting the latest version). If you do, please contact support.

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"Received unexpected response from server (invalid header)"

Possible causes:

1. InstaAlert receives data it does not expect to receive.
2. Your support desk may be "down" and displaying an error message (such as a *MySQL error*).
3. Your support desk may be displaying a **license error**.
4. Your support desk may be reporting that the **setup** directory still exists.

Potential solutions:

1. Ensure you are running the latest stable release of InstaAlert (see Getting the latest version).
2. Ensure your support desk is working properly.

"The session has expired"

Possible causes:

1. When InstaAlert logs into your support desk, it creates an active session for your username. If this session is deleted or ended for any reason, this error will be generated.
2. A common cause of this error is that more than one copy of InstaAlert is being used to login to the same support desk – each one attempting an alternating login that interferes with the other's session.

Potential solutions:

1. Ensure that no more than one copy of InstaAlert is being used to login to your support desk with the **same username**.

"Failed to connect to server"

Possible causes:

1. You have entered an invalid host name in your support desk URL.
2. Your server is unavailable.

Potential solutions:

1. Ensure that you have entered the correct support desk host name and URL in the Options: General dialog.
2. Check the connectivity of your server.

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"Connection to the server timed out"

Possible causes:

1. You have entered an invalid host name in your support desk URL.
2. Your server is unavailable.

Potential solutions:

1. Ensure that you have entered the correct support desk host name and URL in the Options: General dialog.
2. Check the connectivity of your server.

"Authentication has failed"

Possible causes:

1. You have entered the wrong username and password that InstaAlert is attempting to use to login to the support desk.

Potential solutions:

1. Ensure that you have entered the correct username and password in the Options: General dialog.

"HTTP request has failed"

Possible causes:

1. There was a problem in making the HTTP request to your support desk.

Potential solutions:

1. Restart the program. If the problem persists, restart your machine. If the problem still persists, please contact support.

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Support resources

If you would like to send in a suggestion or report any errors in this manual, please send an e-mail to docs@kayako.com or post in the documentation forum - your input is very much appreciated. Please do **not** use this address for support.

You can obtain further support for any of Kayako's products via:

- **Support desk** – www.kayako.com/support
- **Community forums** – http://forums.kayako.com

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